

Site Sales Admin System

Solicitor Training Manual

Version 2 Thursday, 27 February 2014

Background

As one of Persimmon's nominated Solicitors you play an important part in the sales process of each of our homes. This document explains the steps required of you to ensure that the process is as quick and efficient as it can be for both parties.

The URL is https://crm.persimmonhomes.com/Solicitors/SignIn and you will require a password.

Procedure for existing Solicitors

When you log in, you will need to select the 'Account' tab and create a password. If you forget your password, you can click 'Forgotten Password' and a new password will be sent to you.

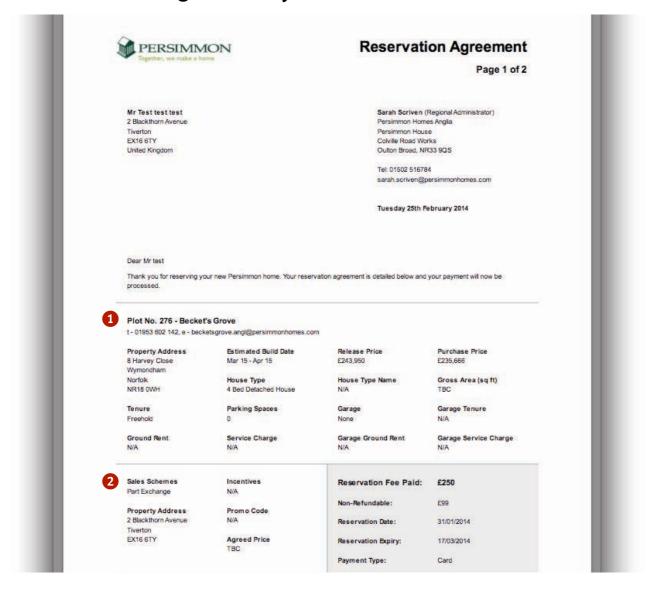
Procedure for new Solicitors

When new Solicitors are added to the system an e-mail is generated and sent with a password and login details.

Data Protection

SAS is a securely hosted, powerful online system that contains the contact details of existing prospects. The password must conform to data protection best practice, so please do not leave login details and passwords in the office.

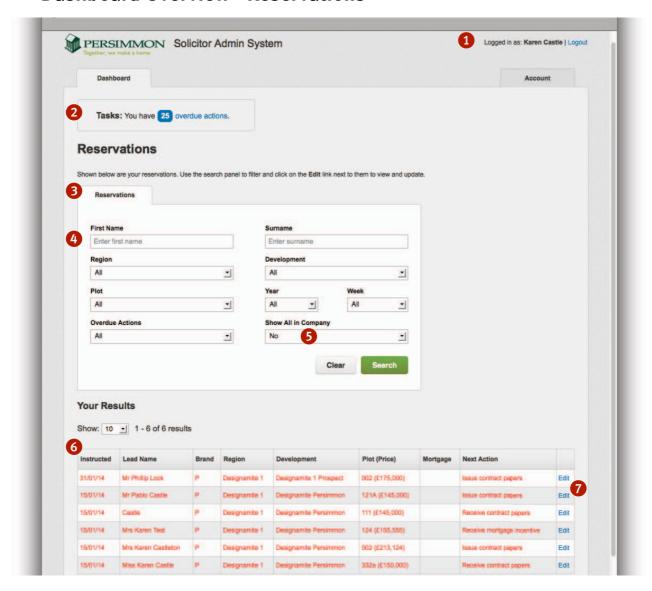
Reservation Agreement by Email



When a customer Reserves you will receive an email of the Reservation form shown above. The customers' details will also appear in the Reservations tab on your Dashboard.

- 1 Plot Details and Customer Information.
- 2 If a Sales Scheme is selected (e.g. Help to Buy), it will be shown here.

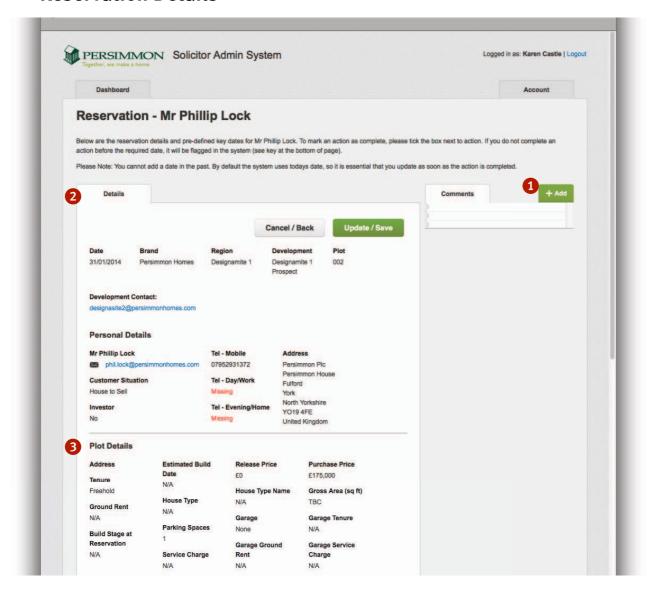
Dashboard Overview - Reservations



Once logged in, the Dashboard is where you manage Reservations.

- Your name is displayed in the top right corner. You can Logout from here.
- Tasks these are your tasks, including overdue actions. Click the links to view details.
- Reservations tab this contains all the Reservations sent for your attention.
- Filter by Name, Region, Development, Plot, Date or Action.
- Show all in Company by default, only Reservations linked to your login are shown. You can view all Reservations linked to your Company by selecting 'Yes' in the drop down.
- 6 Reservations are displayed in date order (most recent first). Overdue actions are shown in red.
- 7 Select 'Edit' to view and/or update.

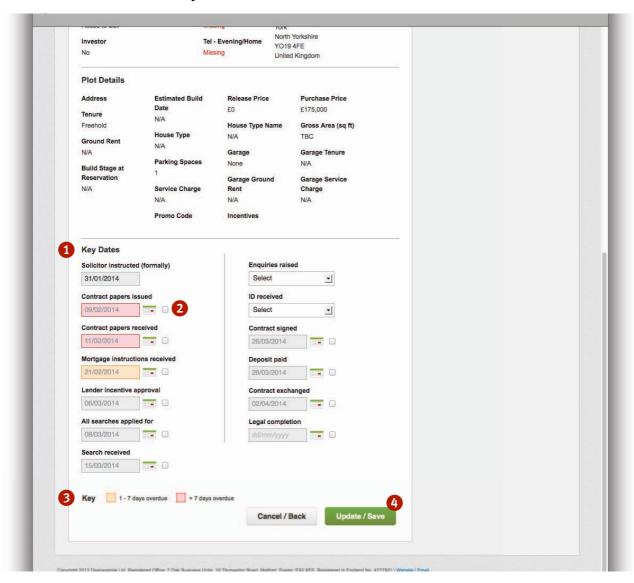
Reservation Details



When you 'View' a reservation you will see something similar to the screenshot above.

- Click the green '+Add' tab to add a Comment to the customer's record. This comment will seen by the Sales Advisor at the relevant development.
- Customer Reservation Details & Site contact information.
- Plot information including purchase price and incentives if applicable.

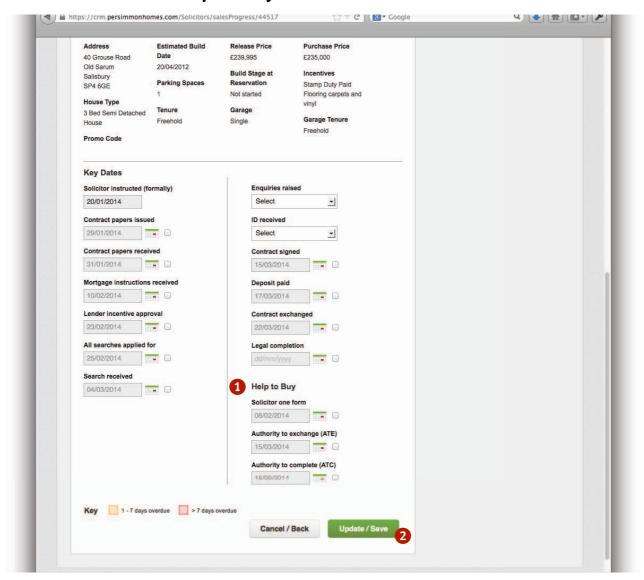
Reservations - Key Dates



Scroll down to view Key Dates.

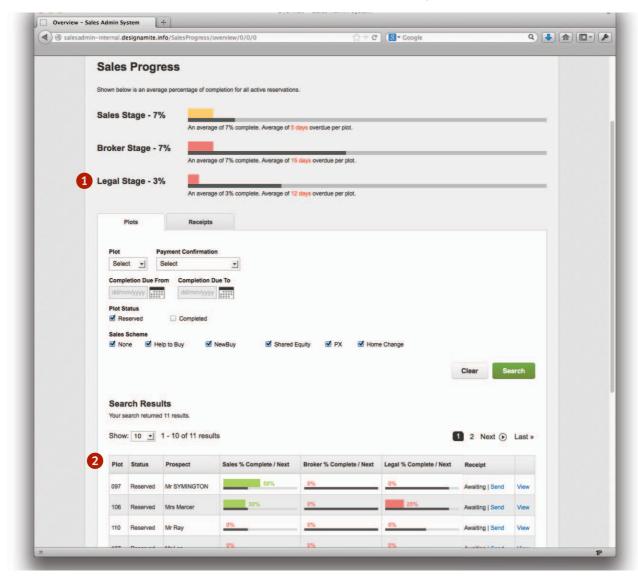
- 1 Key Dates as predefined by Persimmon. You are required to enter the Key Dates for each completed stage. These dates are linked to the Sales Advisors Dashboard and Plot Overview page as part of the overall Sales Progress procedure.
- 2 Tick the box against each step to mark as complete. Sales Advisors will be notified of updates.
- **3** Key Orange means the task is 1-7 days overdue, Red 7+ days.
- 4 Select 'Update/Save' to record any changes.

Reservations - Help to Buy



- 1 If the customer is buying with Help to Buy there are 3 additional Key Dates for you to complete.
- 2 Select 'Update/Save' to record any changes.

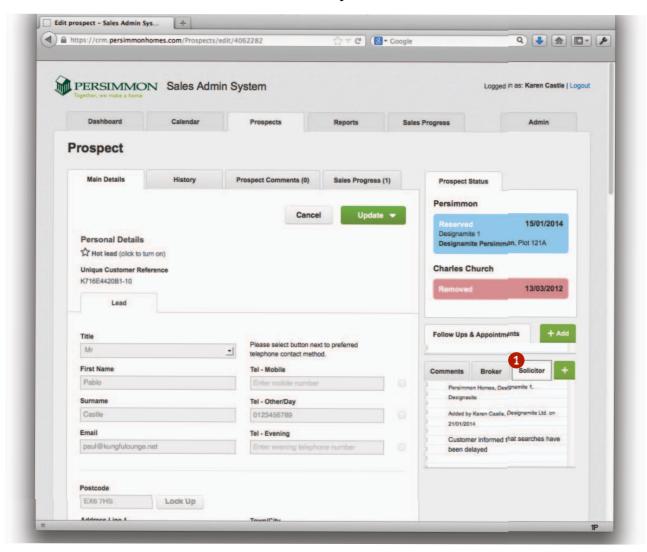
Sales Advisor Dashboard (for reference only)



Sales Advisors have a traffic light system to instantly see the status of each reservation.

- Performance Overview Linked to your Key Dates the dark grey bar is where the Solicitor status should be (please note this is an average across all reservations for that site, not necessarily yours).
- Plot specific Sales Advisors can quickly identify issues. The dark grey bar is where you should be on any given plot, and the coloured % bar above is where you are. Green on target, Orange 1-7 days overdue, Red 7+ days overdue.

Your Comments (for reference only)



Your comments are captured in the 'Comments' section of the customer details for the Sales Advisor to see. This is an example of how it looks.

1 Solicitor Comments field.